

# Information Management TODAY

In the Office of Science

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## Making Progress Together



As we enter the last quarter of FY 2000, we should all be proud of the progress that the Office of Science (SC) is making in information management (IM). Not only are we beginning to deliver a state-of-the-art corporate system that addresses the requirements of all SC Program and Staff Offices, we have also institutionalized excellent management processes (e.g., strategic planning,

the IM Board, the Customer Information Advisory Group (CIAG), Joint Application Development teams, and a reengineered IM Team). In addition, we have taken recent steps to leverage our successes to the SC Operations Offices and Laboratories.

This third issue of "IM Today" highlights three important elements of the corporate SC system, Information Management for the Office of Science (IMSC). First, you will read about IMSC Execution Work Management Version 1.0 that will replace the existing Integrated Procurement System (IPS) and enable users to issue solicitations and maintain information on proposals. Second, you will get an update on the long-awaited capability to electronically communicate budget data between SC Program Offices and the Financial Management Division. Lastly, you will get a glimpse into the future when you read how our web-based Intranet Project will give you (individually) a customized view of SC business information.

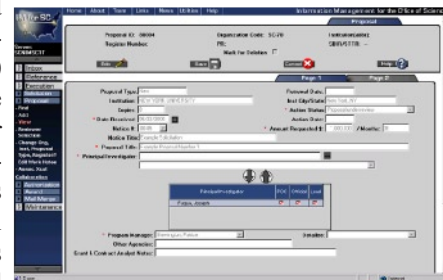
Recently, a contractor sponsored by the Department's Chief Information Officer (CIO) organization conducted an interview/survey of the members of the SC CIAG. The interview/survey is being conducted throughout DOE Headquarters to assess how well the various IM organizations are performing. The CIAG members were not only supportive of what SC is doing, but more importantly, they demonstrated how knowledgeable they are about SC's IM activities. Such awareness and involvement by IM customers is very unusual and demonstrates the "best practices" level at which SC is operating. The CIO's contractor ended the interview by noting the

partnership between the SC IM Team and the Program and Staff Offices. He stated that SC is not only the best in DOE, but one of the best that he has seen in the Federal government. We hope you agree that, together, we are all making information management a success in SC.

*The IM Team*

## IMSC Begins Operation

The IMSC module called Execution Work Management (EWM) Version 1.0 will be available for use in SC in late September 2000. This module supports the SC HQ grants and field work proposal process by allowing users to issue solicitations and



maintain information on proposals. The SC IM Team and the IMSC Program Team have spent considerable time and effort testing all aspects of the system to ensure that this initial rollout of IMSC capabilities provides a smooth transition from the existing Integrated Procurement System (IPS) and interfaces with remaining legacy systems.

The IM Team wants to ensure a quality product. Before we put a product into daily use, it goes through a thorough integration process, including testing, documentation review, and training. As part of the preparation for rollout of IMSC-EWM 1.0, the IM Team has just completed a one-month pilot with a subset of IMSC Team members. The pilot allowed the users to test the EWM module by performing their daily duties in a sample IMSC-EWM environment to ensure that all aspects of the system are operational. This testing has been completed successfully. The full IMSC Team will review the results to ensure that we address all user requirements prior to placing the system into production.

Formal IMSC-EWM 1.0 training will begin in mid-September and will continue through October 2000. To focus training on each user's job function, we will offer a variety of classes (e.g., Organizational Administrator, Grants and Contracts Analyst, Program Manager, etc.). The IMSC Team will determine the final training classes, establish the training schedule, and select the participants.

When training has been completed, IPS will be retired. The data currently retained in IPS will be converted into the IMSC-EWM 1.0 over a four-day weekend period (i.e., Friday through Monday). IMSC-EWM 1.0 will be available to all trained users after data conversion is completed in late September.

## *Video Conference Rooms Added*

The SC IM Team is expanding SC's videoconferencing capabilities. Beginning in July 2000, three videoconference units will be added at Germantown. One unit will be in the Fusion area, and another will be in the High Energy and Nuclear Physics area. The third location is yet to be determined. More units will be added at the Forrestal building later this Fiscal Year or the beginning of FY01.

The new units are Polycomm Viewstations. They use the ISDN network and provide "TV quality" capabilities, similar to the currently installed videoconference units. These new units are more "user friendly" than the current units and may require less technical assistance.

The process for scheduling video meetings will remain the same. Simply schedule the conference room; then call 3-4555 (GTN) to schedule the videoconference session and obtain technical assistance, if necessary.



## *IM Board to Include Field Reps*

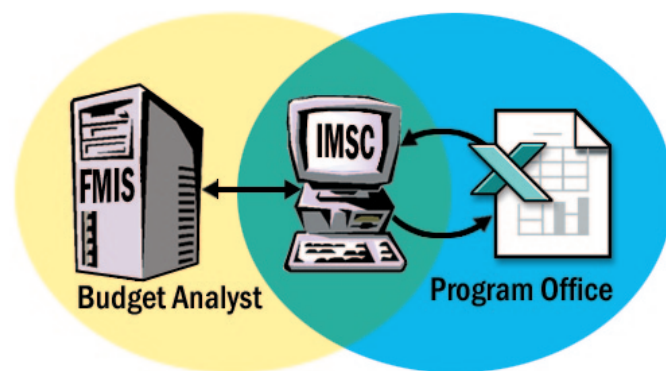
Dr. James Decker, Acting Director of the Office of Science, has requested that the SC IM Board expand to include representatives from the Chicago, Oakland, Oak Ridge, and Richland Operations Offices. In addition, the Chairperson of the System of Laboratory Computer Coordinating Committee (SLCC), which represents all of the labs in the SC laboratory community, has been asked to participate on the Board. The June 29, 2000, meeting began with a briefing by Pacific Northwest National Laboratory. Various SC laboratories will be invited to make presentations on their IM activities and plans at upcoming meetings.

The Office of Science relies on the IM Board to help guide the SC IM program. The Board, which meets monthly and includes a representative from each of the SC Headquarters offices, has actively participated in SC HQ IM activities such as strategic planning, budgeting, policy-making, and major systems reviews. The expanded IM Board is expected to bring a broader corporate view to the IM activities in SC, ultimately leading to a more collaborative environment where successes at one location can be leveraged at others.



## *IMSC: Electronic Budget Becoming Reality*

Users have now had an opportunity to review a prototype of the IMSC Budget Worksheet Exchange (WSX) application. This application provides an electronic means of communicating budget data between all SC Program Offices and the Financial Management Division (SC-63). When the application is complete, Program Office users will be able to receive a Microsoft Excel worksheet from SC-63, calculate numerous budget scenarios, and return the data electronically to SC-63 for easy incorporation into the Financial Management Information System (FMIS). Version 1 of this application will focus on extracting data from the SC-63 budget system and transmitting it to and from the Program Offices. Version 2 will provide enhanced functionality for the Program Offices.



The first Worksheet Exchange release (Version I, Beta 1) was completed on April 19, 2000, for user review. Beta 1, a paper prototype focused on the interface and screen flow that SC IMSC users will use to exchange budget data electronically with SC-63. The second release (Version 1, Beta 2) is a working version of the system with "test data" that is scheduled to be released for user review in late July. After addressing user comments on Beta 2, the third release (Version 1, Beta 3), a pre-production model with real data, will be provided to users for testing in September. After the users have reviewed and provided final comments, the IM developers will make any final revisions necessary to complete coding the software. The software will then go through an integration process including final testing, documentation review, training and rollout to users. This integration process is expected to be completed during the first Quarter of FY01.

Version 2.0 will focus on enhanced functionality for the Program Offices. Program representatives are participating in Joint Application Development meetings to clearly define user needs. Version 2.0 will focus on such features as providing advanced Excel macros, comparing different versions of a given worksheet, and splitting worksheets for multiple user updates. The final training and rollout schedule for Version 2 will be determined as part of the IM Team FY01 Operating Plan.



We have nearly completed the annual update of the SC HQ IM FY 2001-2005 Strategic Plan. Because this Plan is critical to successfully supporting SC's business functions, the needs and views of SC IM users are an important part of the update process. Each SC organization is represented in the groups that review and approve the Plan. In June, the IM Team presented the revised Strategic Plan to the Customer Information Advisory Group and the IM Board. After the IM Board approves the Plan, it will be presented to the SC Executive Steering Committee (ESC) in late July.

Once approved, the Strategic Plan will provide the basis for the FY 01 IM budget, to be approved by the ESC. The Plan also provides the foundation for the annual IM Operating Plan, which will be approved by the IM board. The Operating Plan describes the products and services to be delivered in FY01.

### What Can SC Expect?

The FY 2001-2005 IM Strategic Plan identifies seven packages (similar to software packages) to be delivered over a five-year period. Every package will include several versions, each of which will provide additional capabilities. There are a total of 23 versions planned. Six of the seven packages, summarized below, are a part of IMSC, the corporate SC information system.

- **Reference Package:** Will maintain reference information on SC organization, SC employees, SC programs, guidance/regulatory information, research and support facilities, and expertise.
- **Support Services Package:** Will provide a query and reporting capability for SC's information systems; manage SC's concurrence process and procedures; store and retrieve documents and contact information; manage office equipment; track work assignments; manage meeting resources and logistics; and manage SC's travel process.

- **Management Package:** Will record information on scientific opportunities and programs; manage responses to queries submitted to SC HQS; record information on strategic goal achievement; maintain information on all outreach products; and enable statistical analysis of outreach products.

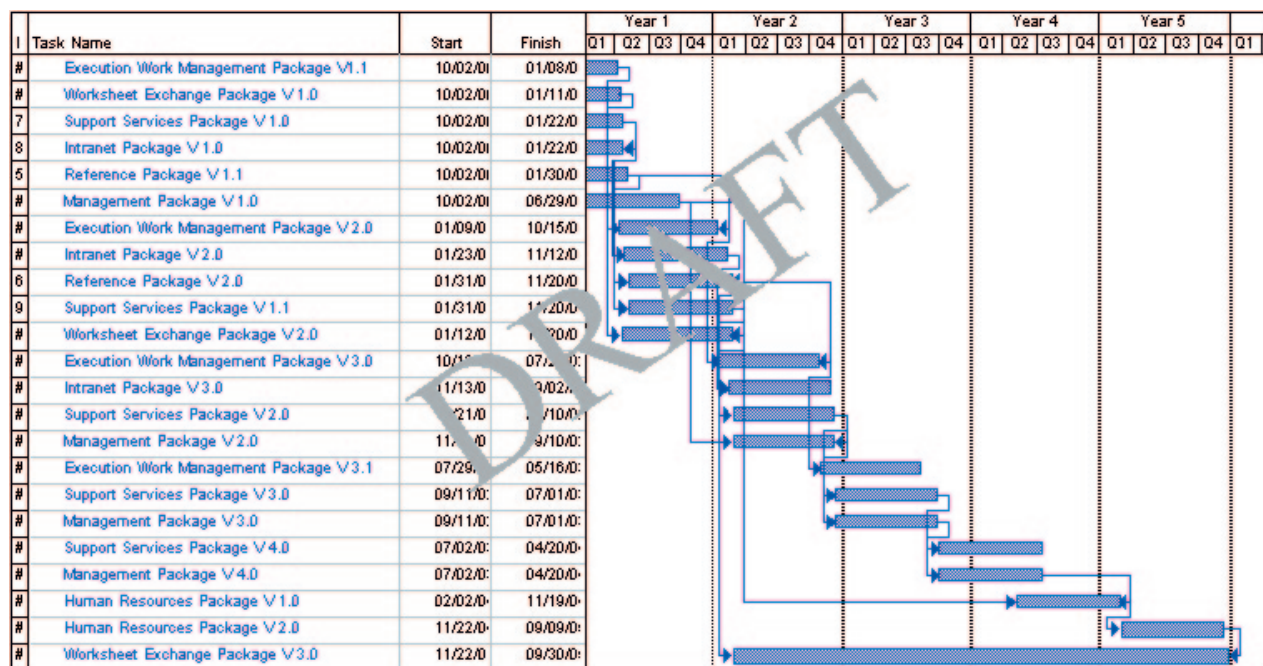
- **Human Resources Package:** Will maintain information on SC-related committees, SC-sponsored awards, training classes, work-force impact, personnel, and human resource actions (e.g., performance evaluation, IDPs).

- **Execution Work Management Package:** Will support the grants and field work proposal process by issuing solicitations and maintaining information on proposals; provide additional mechanisms for releasing and receiving proposals; and track progress of SC-funded work.

- **Worksheet Exchange Package:** Will maintain budget summary information; calculate and present multiple budget scenarios; provide for budget review; record budget and funding decisions; develop budget schedules; enable crosscuts of the budget data; and record associated FTE information.

Although not a part of IMSC, the **Intranet Package** is included in the Strategic Plan. It will provide a personalized Web-based portal, or view, of information needed by users; provide the ability to search a wide array of repositories and Internet sites with a single query; and, ultimately, will include the ability to move official business information electronically among all SC business locations. (See the IM Today Insert for more information on the Intranet Portal Project.)

Look for a list of IM products and services to be delivered in FY01 in the next issue of IM Today.



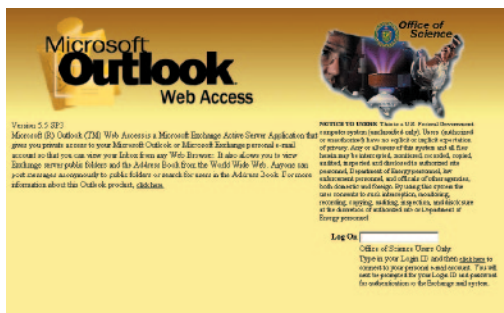
## Frequently Asked Questions

*We keep hearing about Beta releases of new software. What's a Beta?*

A Beta is a "pre-release" version of software that is not quite ready for mass distribution to customers. SC uses Beta versions, as do major software companies, to provide its customers with a preview of what is being developed and to solicit their input in order to deliver quality products and services. With each new delivery of service, the SC IM Team will provide multiple Beta versions (Betas 1, 2, & 3). Beta 1 is a paper prototype, which provides customers with the concept before the actual development has begun. Beta 2 provides a working, electronic copy of the system or capability with "test" data, which provides the customer with the capability to test the system "hands-on." Beta 3 provides a more refined, electronic copy of the system or capability with a copy of valid data, which also provides the customer with "hands-on" experience. Each of the Beta versions contains improvements directly based on customer involvement and input. Finally, the customer input is collected and assembled into a final software Version (1.0, 1.1, 2.0, etc.) for mass distribution.

*Can I check my E-mail without using the remote access solution?*

Yes, if you have internet access, you can check or create Outlook mail by pointing your browser to [owa.sc.doe.gov](http://owa.sc.doe.gov). This will allow you to read your E-mail but will not provide all of the capabilities of



remote access (e.g., access to E-mail archives and SC LAN menu items; access to the N:, P:, and Q: drives, etc.) At the initial logon screen, type in your Office of Science network ID and press Enter. At the next window, type in your Office of Science network ID again, mouse click (or Tab) into the password box below, and enter your Office of Science network password. The next window will be your Office of Science "Inbox." This browser window only displays the 20 most recent messages at a time. In the top right hand corner of the window, you can select the "back arrow" to display the next most recent 20 messages, etc.

*How often do I need to change my network password and how do I do it?*

If you want to change your password, select "Start" button, "Settings," and then "Control Panel." Double-click the "Password" icon. Select the "Other Passwords" button. Type in your current Office of Science network password. In the next "box," type in your "new" password and again confirm your new password in the area provided. Select the "OK" button; a "Password has been successfully changed" dialog box will appear. Exit out of any opened windows. The SC Support Center will notify you in the coming weeks of new password policies and restrictions based on SC's Cyber Security Plan.

## Information Management Contact List



[www.sc.doe.gov/production/orm/621home.htm](http://www.sc.doe.gov/production/orm/621home.htm)

### SC-621

Strategic Planning & Architecture (SPA)			
Ted	Griffin	Federal Lead	3-4602
Pat	Rice		3-4556
Systems Development (SD)			
Gene	Hughes	Federal Lead	3-5409
Systems Engineering (SE)			
Robbie	Green	Federal Lead	3-6578
Application Integration & MGMT (AIM)			
Kathi	Centeno	Federal Lead	3-5472
Production (Support Center)			
Robbie	Green	Federal Lead	3-6578
Jeanne	Beall		3-4587
Program Management (PM)			
Dick	Yockman	Federal Lead	3-3394

### IM Board

Bill	Valdez	Chair	SC-5
Bill	Nay	Security Advisor	SC-62
Melea	Baker	Exec. Sec. Mgt. Team	SC-30
Peggy	Burris		SC-4
Steve	Buswell		SC-7
Greg	Dilworth		SC-17
Bob	Woods		SC-22
Mary-Anne	Scott		SC-30
John	Willis		SC-55
Myrna	Vallette		SC-62
Mike	Riches		SC-70
John	Yates		SC-82

### IMSC Team

Peter	Rosen	Co-Champion	SC-20
Ari	Patrinios	Co-Champion	SC-70
John	Alleva	Co-Lead	SC-64
Marvin	Stodolski	Co-Lead	SC-72
Diane	Dunlop		OSTI
Dean	Oyler		SC-5
Anne Marie	Zerega		SC-5
Norman	Kreisman		SC-5
Steve	Buswell		SC-7
Joseph	Martinez		SC-14
Nicholas	Woodward		SC-15
Donna	Sier		SC-22
Walter	Polansky		SC-32
Stephen	Eckstrand		SC-55
John	Sauter		SC-55
Myrna	Vallette		SC-62
Isla	Linger		SC-63
William	Burrier		SC-64
John	Yates		SC-82
Anna	Lowe		SC-83

### CIAG MEMBERS

John	Willis	Chair	SC-55
Greg	Dilworth	Alt Chair	SC-17
Patricia	Rice	Exec. Secretary	SC-621
Shahida	Afzal	Exec. Sec. Mgt. Team	SC-50
Peggy	Burris		SC-4
Brian	O'Donnell		SC-5
Steve	Buswell		SC-7
Dean	Oyler		SC-22
Cathy	Hanlin		SC-23
Jane	Hiegel		SC-31
Steve	Eckstrand		SC-55
Marvin	Stodolsky		SC-72
Sharon	Betson		SC-73
Caryle	Miller		SC-82
Barry	Parks		SC-83
Emily	Knouse		SC-622



## Office of Science Intranet Portal



### What Is It?

Work is underway to provide each user with a personalized web-based portal (i.e., a window or view) of the SC corporate information needed to do his or her work. The ultimate goal of this Intranet Project is to allow easy access across all SC locations to SC corporate information using a secure SC Intranet web interface. With this personalized view, the user will be able to reduce the amount of time needed to search for business data to complete budget, procurement and human resource functions. Seamless access to schedule, reporting, Internet information sources, and database query services will be on the user's desktop when he or she connects to the SC Intranet Portal.

Users will be able to select from a wide range of menu choices to set up a personal desktop view. Users can then easily save, and change their choices so that, once logged in, they will see the information needed without having to search for it. The menu could include: (1) public information sources such as the SC Home Page, the DOE Home Page, White Pages, Yellow Pages, and personal links created by the user; (2) facility information and DOE executive information such as Weekly Reports, hearing schedules, audit activities, and Congressional reports; (3) access to IMSC capabilities for those who have rights to the information; (4) access to forms, phone and employee locator services; and (5) management categories such as E-mail and calendar management, label creation for contact lists, workflow capabilities, and routing of information and publications. The graphic on the opposite side of this insert shows the concept and some of the possible choices.

In addition to providing a personalized view of all information and tools important to a given user, the Portal will provide the ability to search an array of SC repositories and Internet sites with a single query. A user can customize and maintain an organized view of data from many sources on the SC Intranet and non-SC Internet locations for reuse and update on an on-going basis.



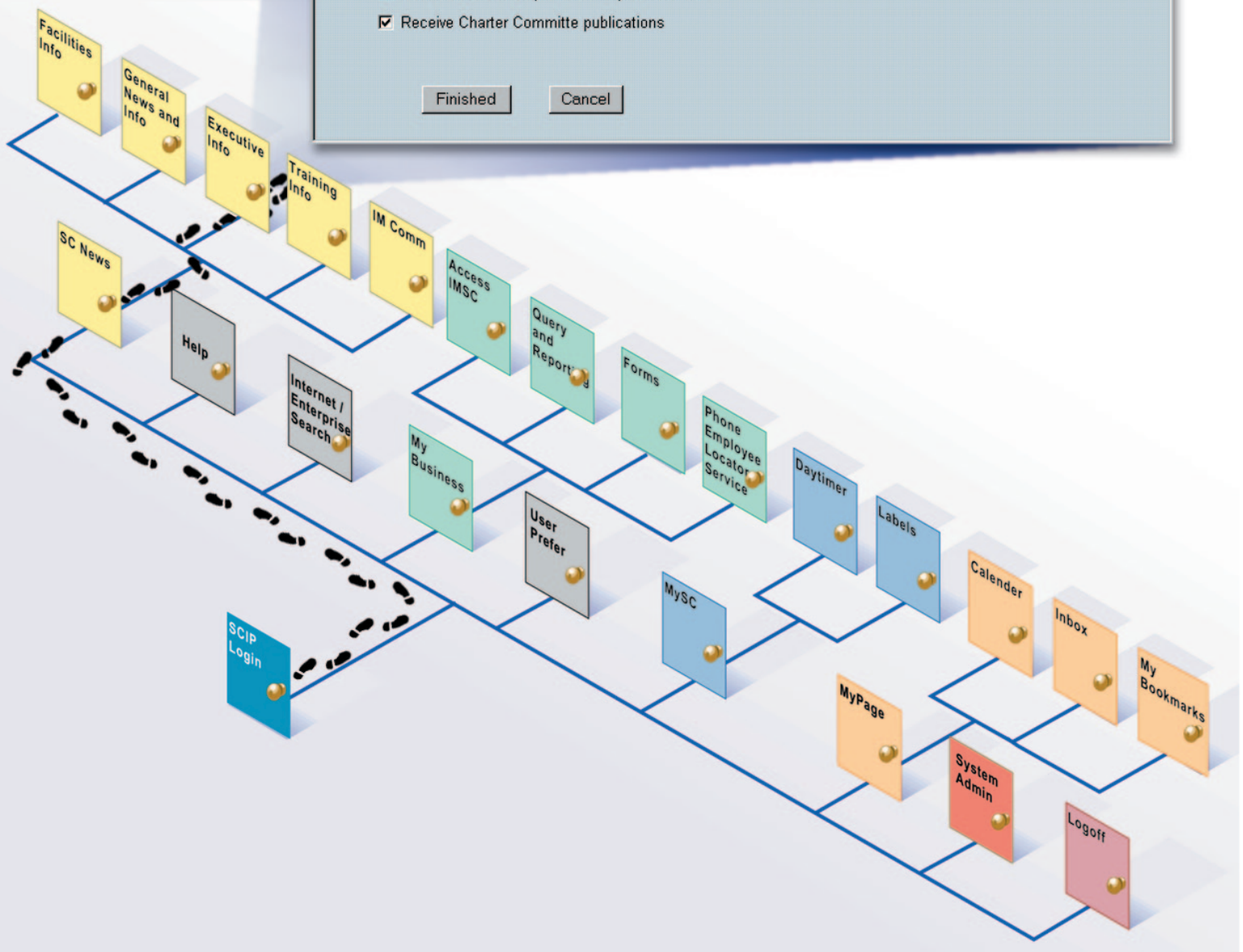
### When Will it be Available?

A Joint Application Development (JAD) team of SC users and developers is currently working to define requirements for Version 1.0 of the Portal. A paper prototype (Beta 1) has been developed showing what the desktop screens might look like. JAD participants are reviewing this material to provide detailed input on the types of information users would like to be able to select for their own personalized information views. Betas 2 and 3 are scheduled for August and September, with final coding planned for October. (That schedule, of course, depends on the results of planned JAD sessions for each Beta.) After a thorough integration process, including testing and training, Version 1.0 of the Portal should be available to SC HQ users during the first Quarter of FY01.

### What's Next?

Additional phases of the Intranet Portal project will include the ability to move official business information, including PR forms, Financial Plan changes, solicitations, research progress, and other types of business forms and reports electronically among all SC Federal locations. Later phases of the project include the development of an Extranet capability to allow SC business information to be posted and/or published automatically. This will allow access by external research locations and will permit progress and status information to be submitted electronically for processing into the SC Intranet and the IMSC system. Security requirements, of course, will be carefully considered throughout the project.





Functional Architecture Diagram for the **Office of Science Intranet Portal v1.0**